



Odyssey CMS Cheat Sheet

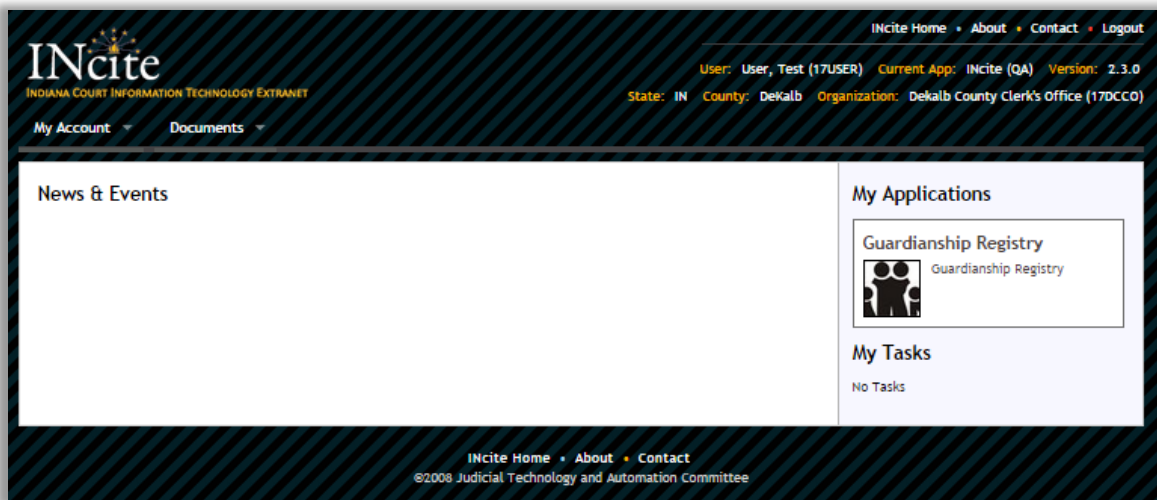
Topic: Guardianship Registry (GR) Interface

Date: 09/07/2016

Summary: This cheat sheet will instruct the user how to utilize the Guardianship Registry (GR) Interface. When cases are created via the GR the case will be electronically generated and available real-time in the Odyssey Case Management System ("Odyssey CMS") for the counties utilizing that application.

Important: Odyssey is software owned by Tyler Technologies, Inc. Any screenshots of Odyssey may contain proprietary information that should not be disclosed to non-Odyssey users.

1. If necessary, perform a search in Odyssey prior to creating the case in the GR to determine whether a specific court should receive the GR case assignment. (See Cheat sheet "GR Tips – Searching for a Case")
2. "Create" the case via the GR by entering the required information and as much additional information as is available that can be entered via the GR in INCite. (See: Separate GR User Manual)



An Odyssey CMS case number will be system assigned upon the completion of the GR case creation. If the case needs to be assigned to a specific court select that court from the Court selection drop-down menu at the top of the Case Information screen.

NOTE: All GR case sequence numbers contain 6 digits. Odyssey will assign the sequence number based on your county's case pool. To search for your case in Odyssey, you may need to remove a leading zero from the filing sequence number.

3. After the GR case has been created, it is available in the Odyssey CMS and can be accessed via Find a Case. Perform a search using the case number, the GR Case ID number, the party names, etc.

NOTE: While the case creation is "real time", all other activity is batched and may take a little time to appear in Odyssey. Likewise, data flowing from Odyssey to GR could take some time to appear in the GR.



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02D01-1409-GU-000177

Forms Save Exit

Summary Detail Parties Events Service Hearings Conditions Financial Notes

In Re: the Guardianship of Aaron Macon
Type GU - Guardianship

Style In Re: the Guardianship of Aaron Macon

☒ Auto Style

Case Assignment Reassign

Case Number 02D01-1409-GU-000177
Court Allen Superior Court 1
Date Assigned 09/16/2014
Judicial Officer Boyer, Nancy

Case Cross Reference Numbers +

Guardianship Registry 441

Case Status +

09/16/2014 Pending

Related Cases +

Type **GU - Guardianship**
Subtype
File Date 09/16/2014 12
Security

Print Label

Case Files +
Clerk's Office

Case Flags +

Additional Barcodes +

4. All party information entered into the GR case will migrate to the Odyssey CMS Parties Tab. However, some parties will be added at the time of creation and others when specific actions are taken. (For example: "Petitioners and Incapacitated Adult/Child" are added at the case creation.)

NOTE: When there is a **Successor**, revoke current guardian in the registry and add a new guardian. Add new attorney, then update Odyssey connection type.

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Forms Save Exit

Summary Detail Parties Events Service Hearings Conditions Financial Notes

In Re: the Guardianship of Aaron Macon
Type GU - Guardianship

Group By Connection Type Show Active Parties/Participants

☐ Related Parties View

Party & Attorney Information Add Party Add Attorney Add Group/Associate

Guardian Macon, Tyrone

Incapacitated Adult/Child Macon, Aaron Michael

Petitioner Macon, Tyrone

5. Case fees will be assessed manually or auto-assessed, depending on your county's configuration, via the Odyssey CMS Financial Tab.
6. Most events are added electronically via actions taken in the GR. (QCSR Events and other data must be added manually via the Odyssey CMS.)

For example:

"Case opened as a New Filing"
"Petition to Establish Guardianship Filed"



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"Petition for Emergency/Temporary Guardianship Filed"
"Order Denying Petition to Establish Guardianship"
"Bond Form Filed"
"Court Set Bond"
"Order of Dismissal"
"Order Granting Motion to Terminate Guardianship"
"Inventory Filed"
"Accounting Filed"
"Oath Filed"

- a. Hearing data will be managed via the Odyssey CMS and will flow outbound from Odyssey to the GR. This data includes all modifications to the calendar such as rescheduled hearings, vacated hearings, etc.
 - b. Service tracking is entered via Odyssey.
7. Venuing cases (in-between counties) will be done in the GR.
8. Case closure information will be updated via the Odyssey CMS:
- a. Dispositions/Judgments;
 - b. QCSR Events and other statistical data;
 - c. Statistical Closures;
 - d. Case Status (Pending/Decided); and,
 - e. Transferring Cases (Always select reason as "Change of Court").

General Information and Responses to FAQ's

1. All newly created GR cases will be available in Odyssey for your court. *If you need to add an existing Odyssey case to the GR you must contact the Helpdesk to **temporary disconnect the interface** to prevent the assignment of a new case in Odyssey. Once the case is created in the GR it can be synced to the Odyssey case.*
2. Case numbers will be assigned electronically based on your court's case pool assignments.
3. All GR case sequence numbers contain 6 digits. Odyssey will assign or convert the appropriate amount of digits in the sequence number based on your county's case pool. Most county case numbers utilize a 5 digit sequence number, however, some county case numbers utilize a 6 digit sequence number.
4. Case security, for juvenile matters or other confidential or sealed cases, will operate customarily in the GR and in the Odyssey CMS.
5. Generally, case creation and maintenance are performed via the GR application:
 - a. Creating the case and assigning the case number;
 - b. Most Event information (Except QCSR events and data);
 - c. Forms and Notices
 - d. Adding and updating parties.
 - e. Venue In/Out



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Odyssey Interface

Case Creation

The following Case Events will flow to Odyssey when the case is created in the Registry through the interface. Additional case events will be added to the case based on the data that is entered in the Registry i.e. Appearance Filed and Oath Filed.

QCSNEW	<i>Case Opened as a New Filing</i>
PEG	<i>Petition to Establish Guardianship Filed</i>
PETG	<i>Petition for Emergency/Temporary Guardianship Filed</i>

Party Creation/Update

All new parties must be added to the case in the registry to ensure that all required data is captured in the registry. After the party has been added to Odyssey through the interface, updates to the party record can be added in Odyssey and it will update the party record in the registry.

Attorney Assignment

When an attorney is added to the party record in the Registry, either at the initial case creation or afterwards, the attorney will be added to the appropriate party in Odyssey. The Appearance Filed event will be added to the case as well.

APP	<i>Appearance Filed (Name)</i>
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Case Events Added in Odyssey

When the following events are added to the case in Odyssey, they will be added to the Guardianship Registry Case Event list.

Odyssey Event Code	Event Description
SI	<i>Service Issued</i>
SRS	<i>Service Returned Served</i>
SRNS	<i>Service Returned Not Served</i>
ADMWCPA	<i>Waiver/Consent to Proposed Action Filed</i>
LG	<i>Letters of Guardianship Issued</i>
ORD	<i>Order Issued</i>
OAPT	<i>Order of Appointment</i>
OGTG	<i>Order Granting Temporary Guardianship</i>
PR	<i>Physician's Report Filed</i>
CBP/SBP	<i>Cash/Surety Bond Entered in Clerk's Office</i>

When the following events are added to the case in Odyssey, the associated action will be updated in the Guardianship Registry.

Events added in Odyssey	Event Description	Update to Registry
*HSACT	<i>Hearing Scheduling Activity</i>	<i>Populate Hearing Date and Time</i>
ODPEG	<i>Order Denying Petition to Establish Guardianship</i>	<i>Populate Order Denied Date</i>
ODIS	<i>Order of Dismissal</i>	<i>Populate Order Dismissed Date</i>
ARJBOND	<i>Court Set Bond</i>	<i>Set Bond Filed to Yes</i>
CBP/SBP	<i>Cash/Surety Bond Entered in Clerk's Office</i>	<i>Set Bond Posted to Yes</i>
OGMTGU	<i>Order Granting Motion to Terminate Guardianship</i>	<i>Populate Order Terminated Date</i>
ADMOAF	<i>Oath Filed</i>	<i>Set Oath Filed to Yes</i>
LG	<i>Letters of Guardianship Issued</i>	<i>Populate Letter Issued Date</i>



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OGTG/OGPEG	Order Granting Temporary Guardianship / Petition to Establish Guardianship	Populate Order Date
CCIE	Administrative Event	Deletes Case

* This event must be entered in Odyssey.

When the following actions are taken in the Guardianship Registry, the associated case event will be added to the case in Odyssey.

Action Taken in Registry	Odyssey Event Code	Case Event added To Odyssey
Deny Petition	ODPEG	Order Denying Petition to Establish Guardianship
Dismiss Petition	ODIS	Order of Dismissal
Populate Order Terminated Date	OGMTGU	Order Granting Motion to Terminate Guardianship
Set Bond Filed to Yes	ARJBOND	Court Set Bond
Populate Bond Posted Date	ADMBFF	Bond Form Filed
Set Oath Filed to Yes	ADMOAF	Oath Filed
Set Accounting Filed to Yes	AJAACC	Accounting Filed
Set Inventory Filed to Yes	ADMINV	Inventory Filed
Populate Order Date	OGTG/OGPEG	Order Granting Temporary Guardianship / Petition to Establish Guardianship
Populate Letter Issued Date	LG	Letters of Guardianship Issued
Add GAL/CASA Name	QCSGAL	GAL/CASA Appointed
Set Instructions Filed to Yes	IE	Instructions Executed
Set Status Report Filed to Yes	AJAREP	Status Report Filed